

A Golf Research Presentation



Attracting The Golf Travel Market To Hawaii

- Identify the profile of golf visitors to Hawaii
- Understand decision-making process and role of golf in process
- Identify attitudes, behavior and habits related to golf and golf-related travel
- Identify attitudes, behavior and habits related to travel to and playing golf in Hawaii

Methodology

- Multi-phased, multi-method
 - Self-administered survey of PGA TOUR Partners Club members
 - April – May, 2002 and 2003
 - 4,000 mail out; **539** in 2002, **585** in 2003 usable surveys
 - Seven states (CA, NY, NJ, MN, WA, TX, IL)
 - Self-administered survey of PGA tournament attendees
 - June – August, 2003
 - 1,683 mail out; **213** usable surveys
 - Three tournaments (Byron Nelson, Western Open, Buick Classic)
 - Self-administered survey of golf visitors to Hawaii
 - June – August, 2003
 - **1,180** usable surveys
 - Koolau, Hawaii Prince, Hapuna, Waikoloa, Mauna Kea, Wailea, Makena, Kauai Lagoons
- **Analysis of nearly 2,000 golfers**
 - Conducted using SPSS, an in-house statistical package

A Note On Presentation

- “Hawaii Sample” refers to those surveyed in Hawaii at golf courses
 - “Mainland Sample” mostly refers to PGA TOUR Partners Club members
 - Illustrates similarities, validates findings
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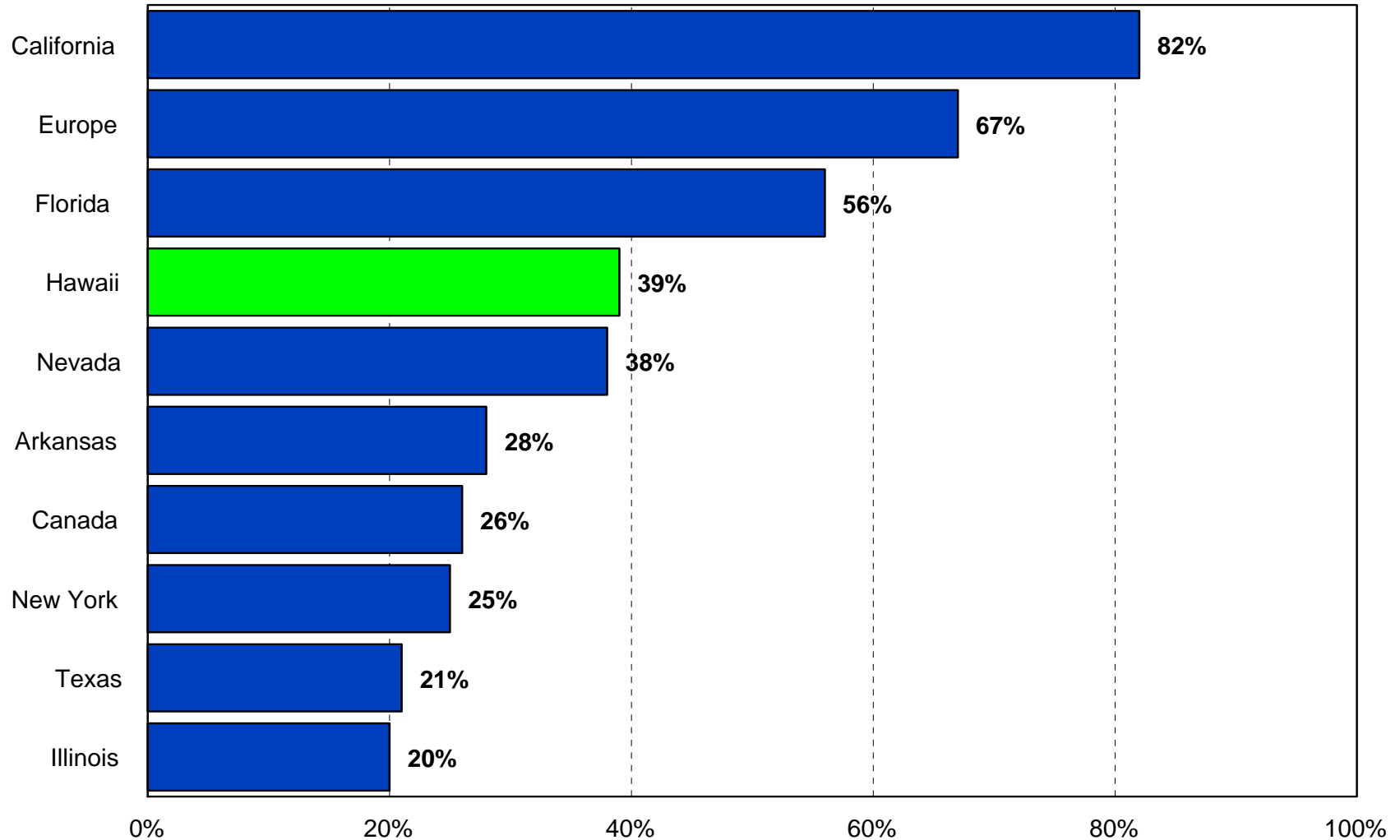
Demographic Profile

	Hawaii Sample	Mainland Sample
Median Age	50.09 years	53.04 years
Median Income	\$100,000+	\$104,838.71
Household Size	2.81	2.40
Children	36%	25%
West Coast	52%	Na
Male	75%	93%

Golf Habits

	Hawaii Sample	Mainland Sample
# times golf/mo	6.30	5.49
HH golfers	52% spouse	34% spouse
Yrs playing golf	19.75	21.24
Belong to Club	39%	28%

Popular Destinations

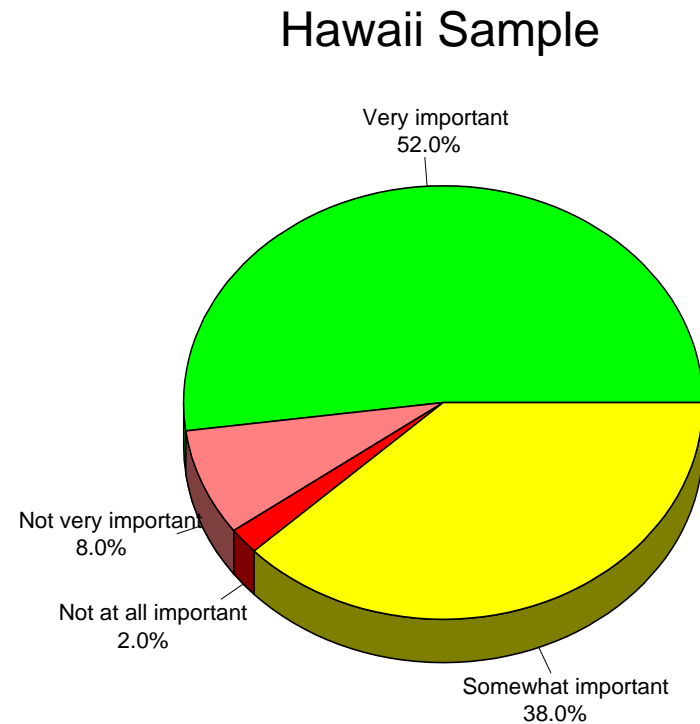
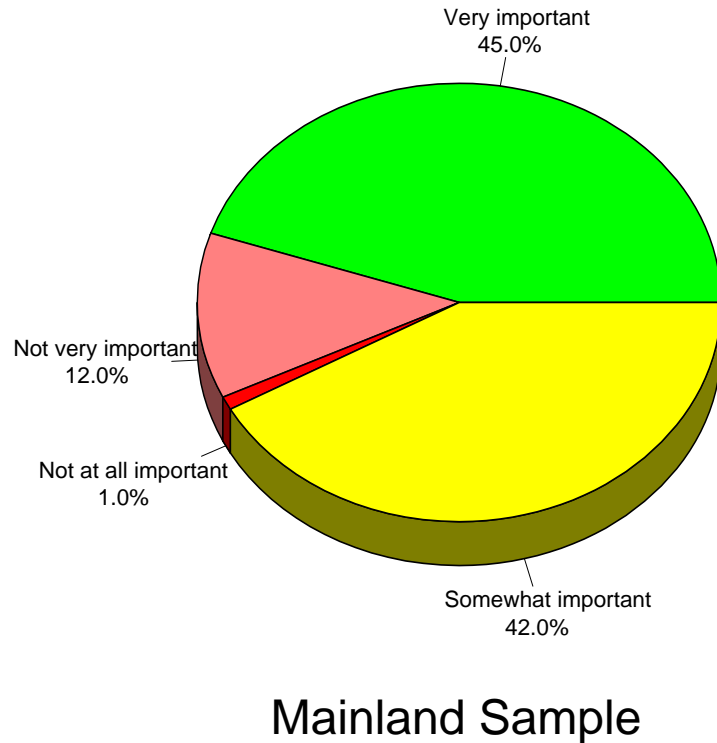


Mainland Sample only. Figures are for leisure, business or both types of travel. Not asked among Hawaii sample.

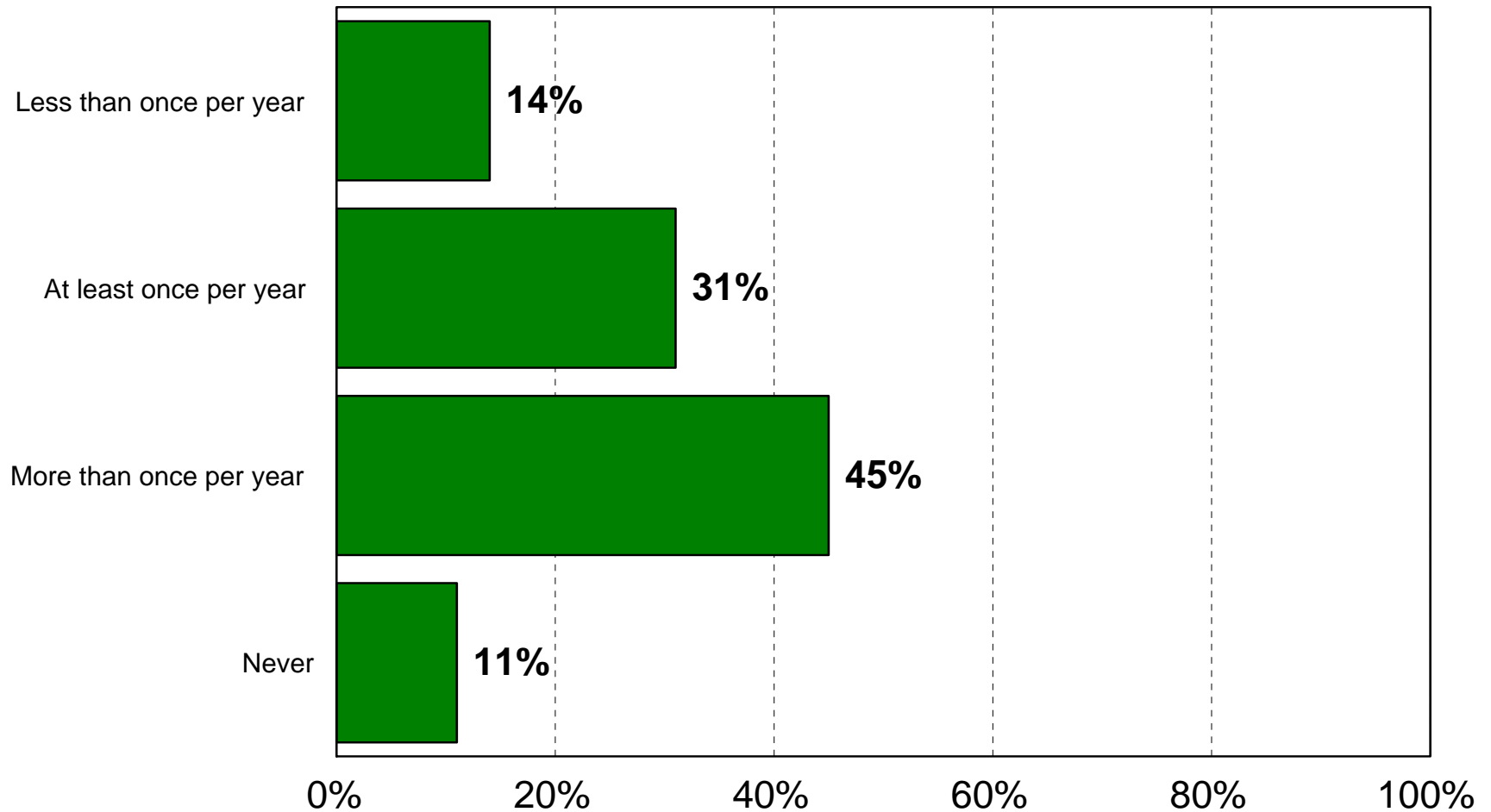
Hawaii Travel Behavior

	Hawaii Sample	Mainland Sample
Been to Hawaii	100%	64%
Length of stay	11.56 days	NA
Visits to Hawaii	9.89	2.54
Staying at hotel	61%	NA
Staying at condo	29%	NA
Likelihood to return	84% “very likely”	69% “very likely”

Importance of Golf in Decision-making Process



Frequency Of Taking Golf Vacations

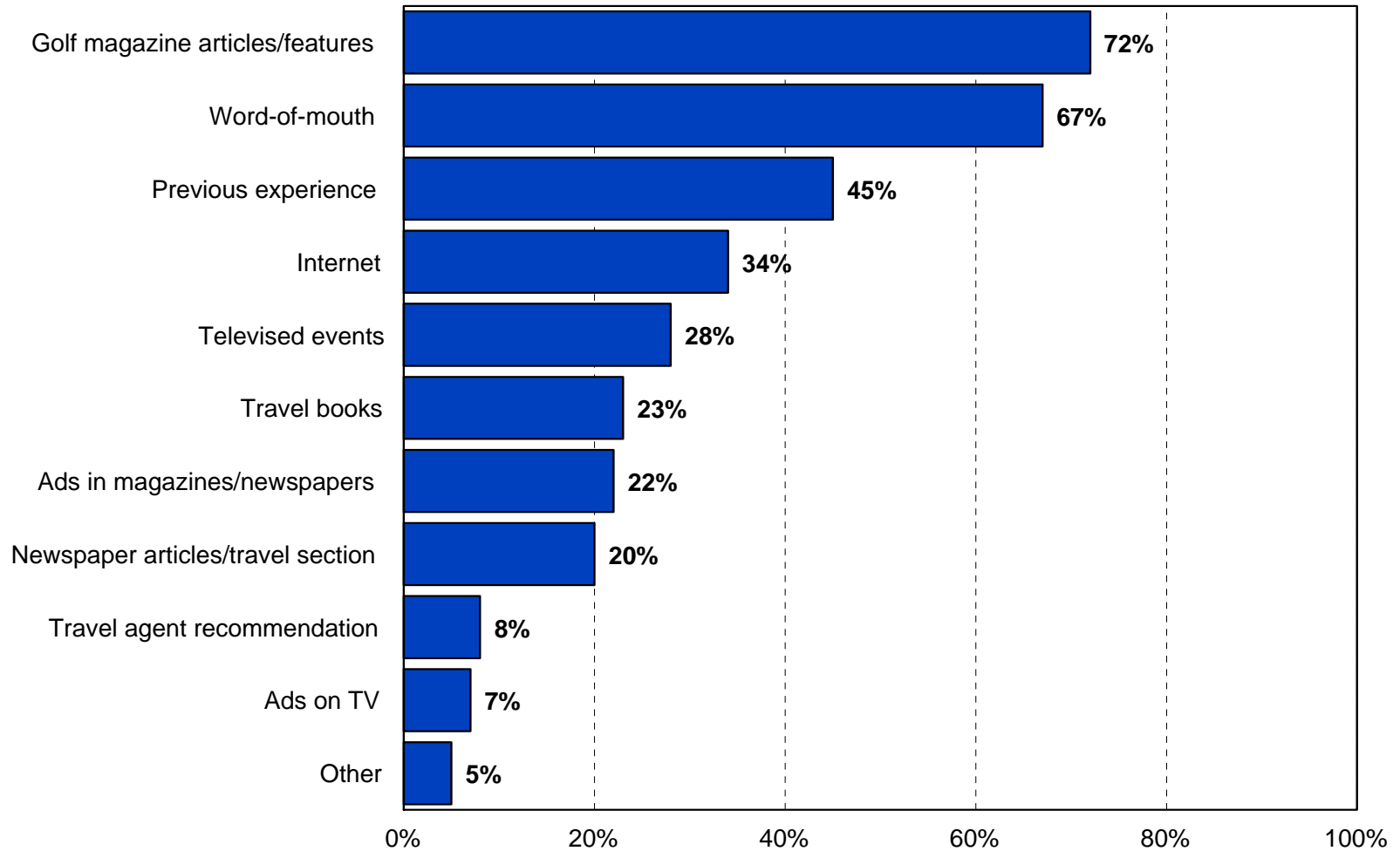


Hawaii Sample only. Mainland sample near identical.

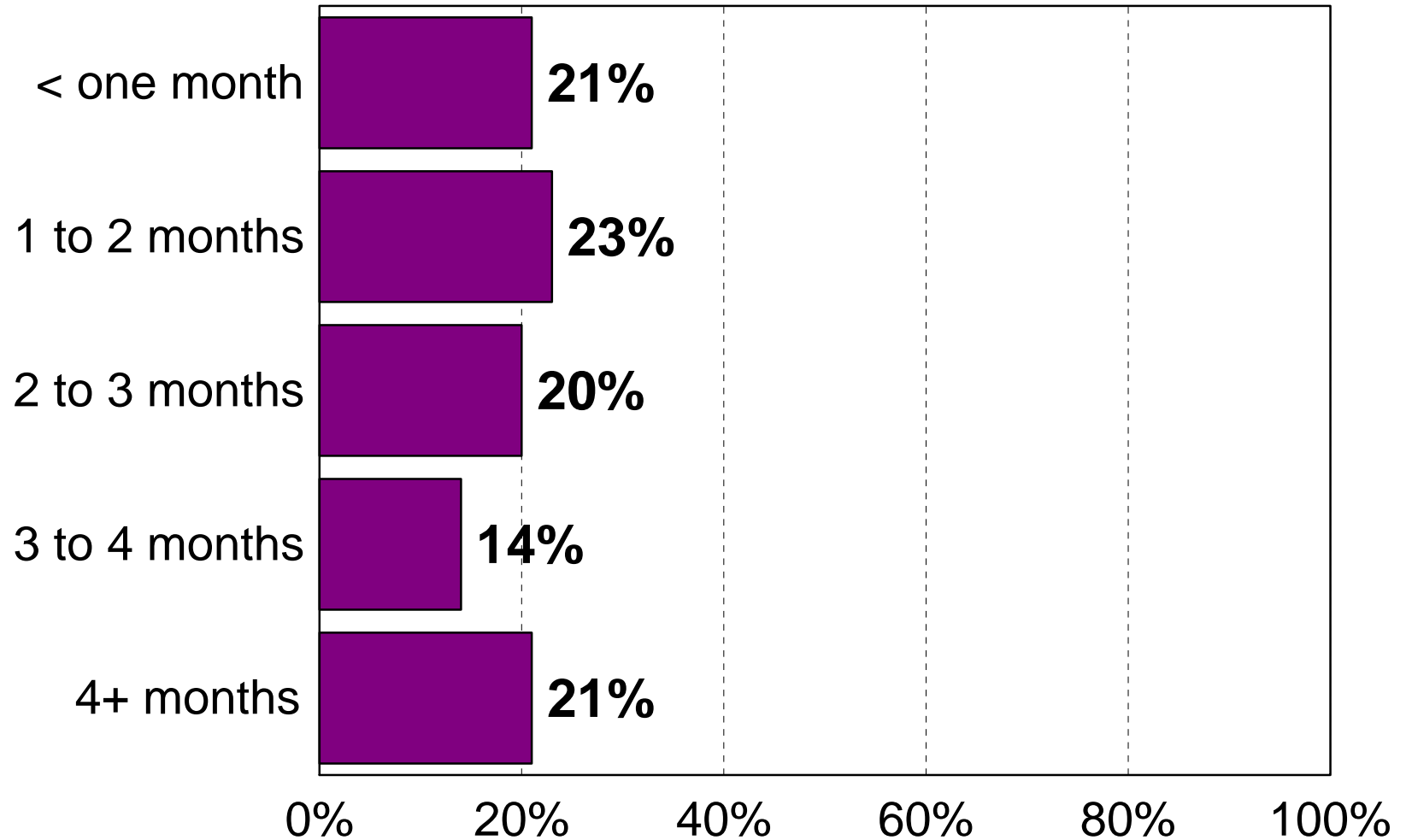
Booking Golf Vacations

	Hawaii Sample	Mainland Sample
Direct/Self	62%	55%
Internet	22%	23%
Travel Agent	13%	13%
Other way	3%	8%

Sources of Information

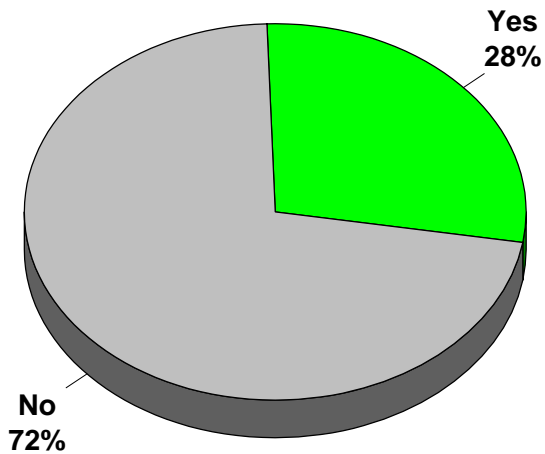


How far in advance do you make your golf arrangements?



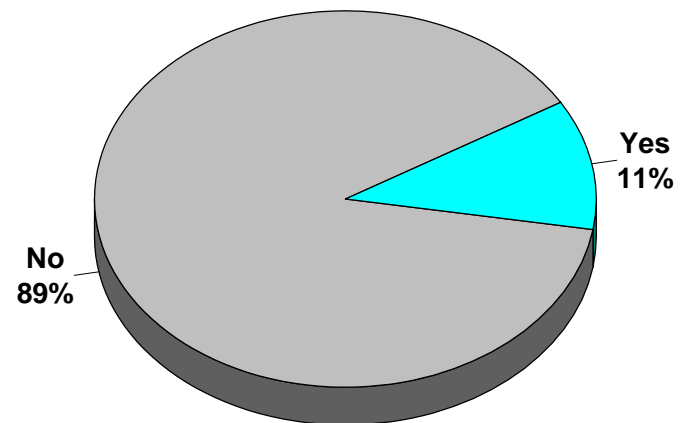
Purchase Golf Package

Mainland Sample



Q: Do you generally purchase golf packages?

Hawaii Sample

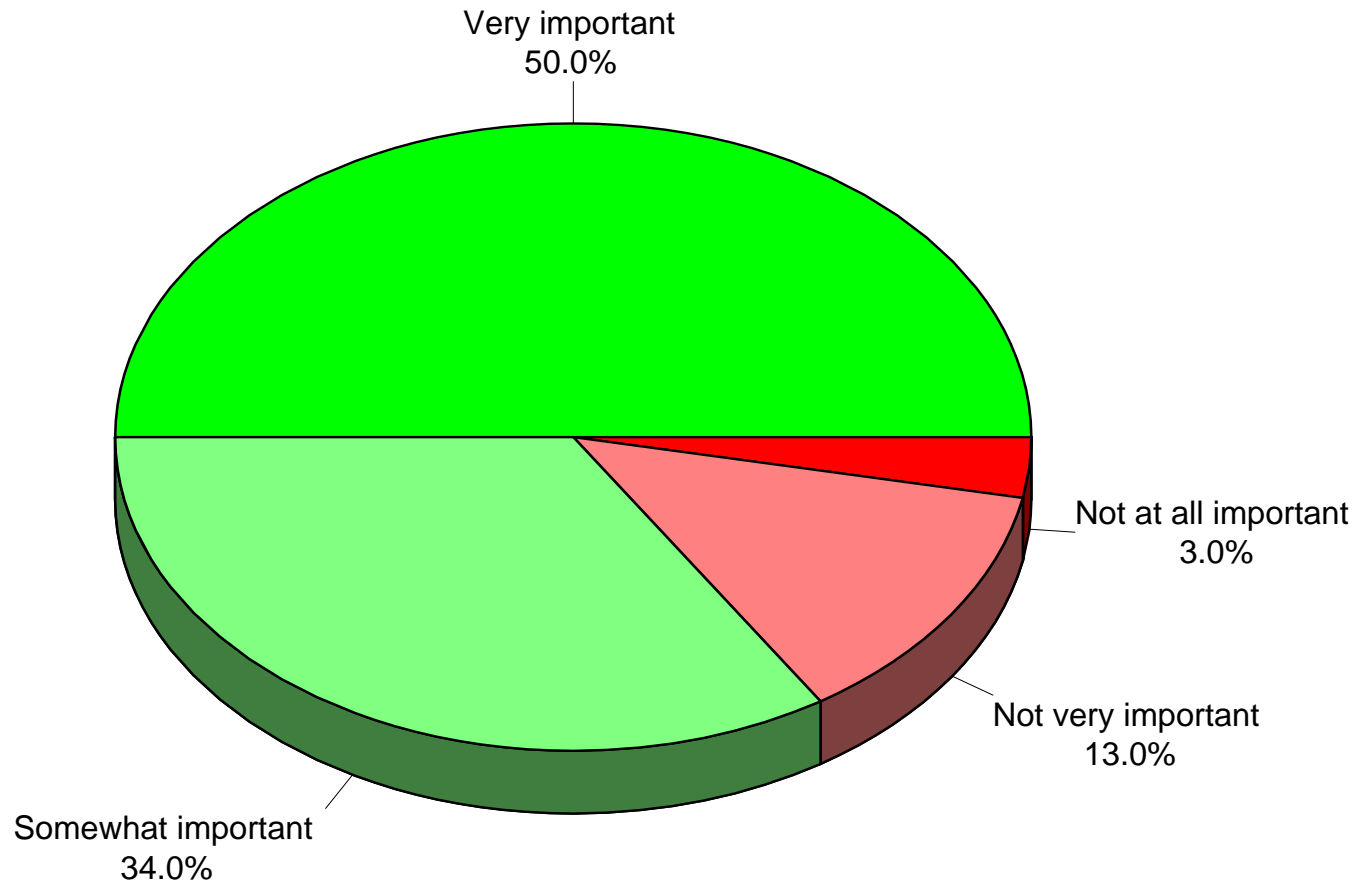


Q: Did you purchase a golf package?

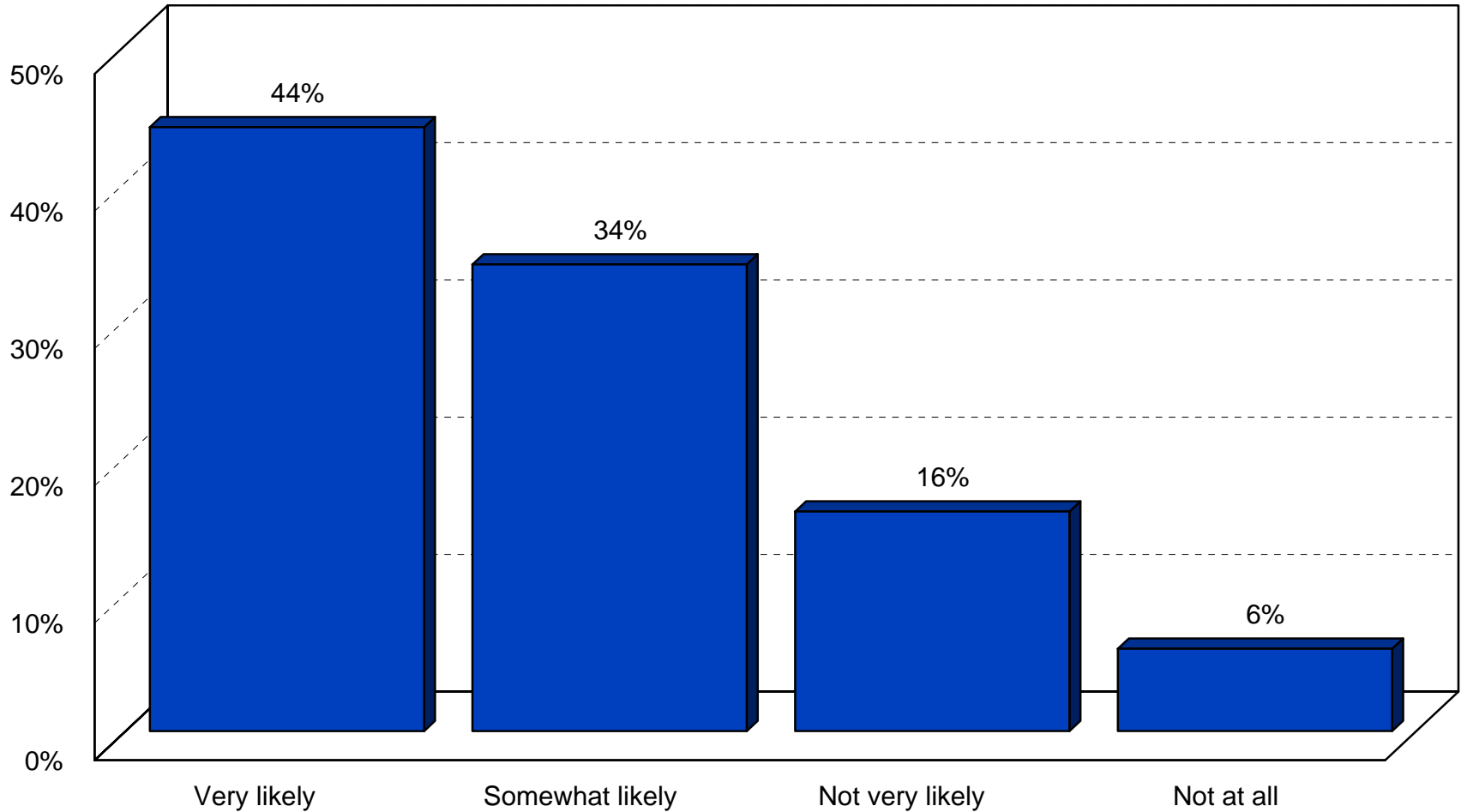
Method of Booking Tee Times

	Hawaii Sample	Mainland Sample
Direct/Self	64%	76%
Internet	4%	13%
Travel Agent	6%	7%
Other way	26%	4%

Importance of Guaranteed Tee Times

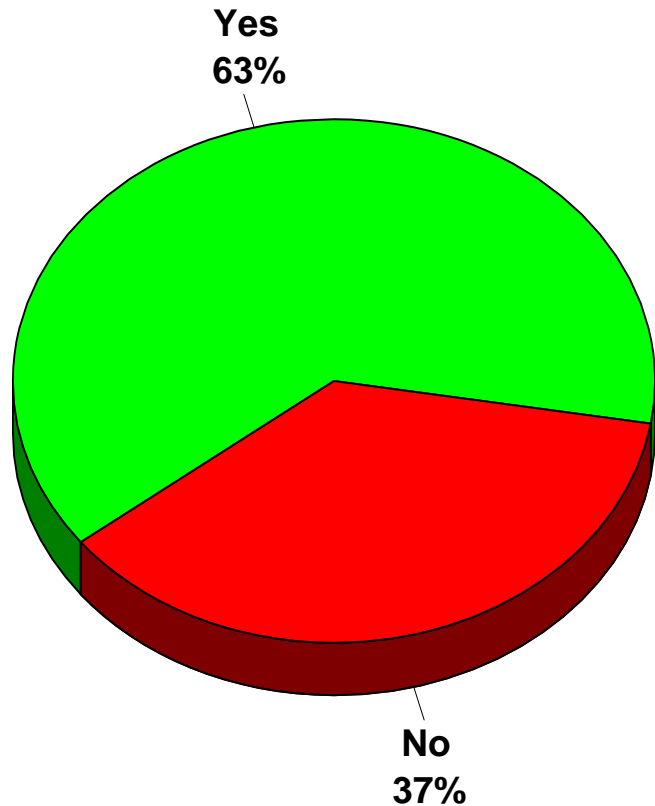


Securing Tee Times Via Internet



Hawaii Sample only.

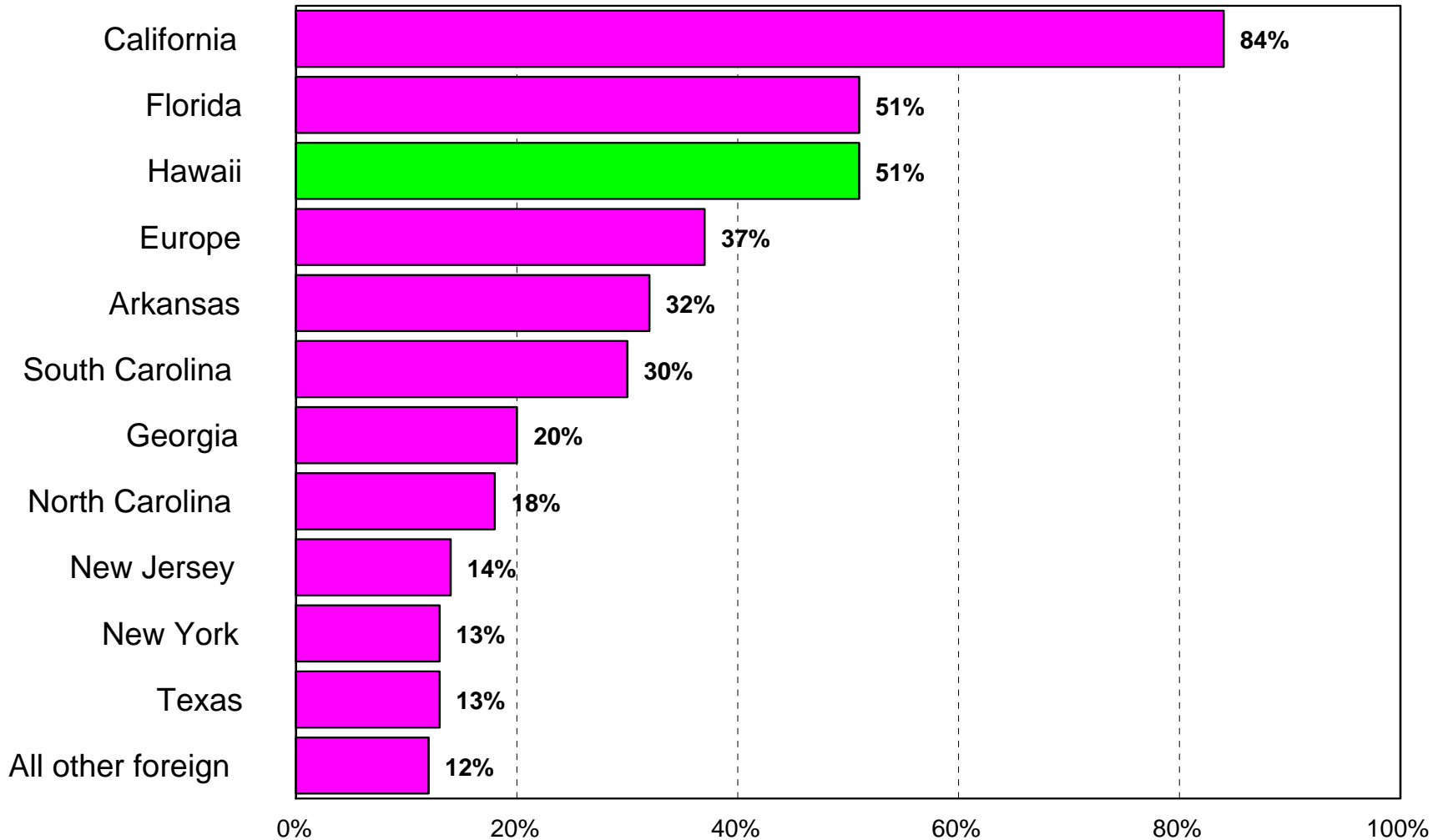
On your last visit to Hawaii, did you golf?



■ Why not?

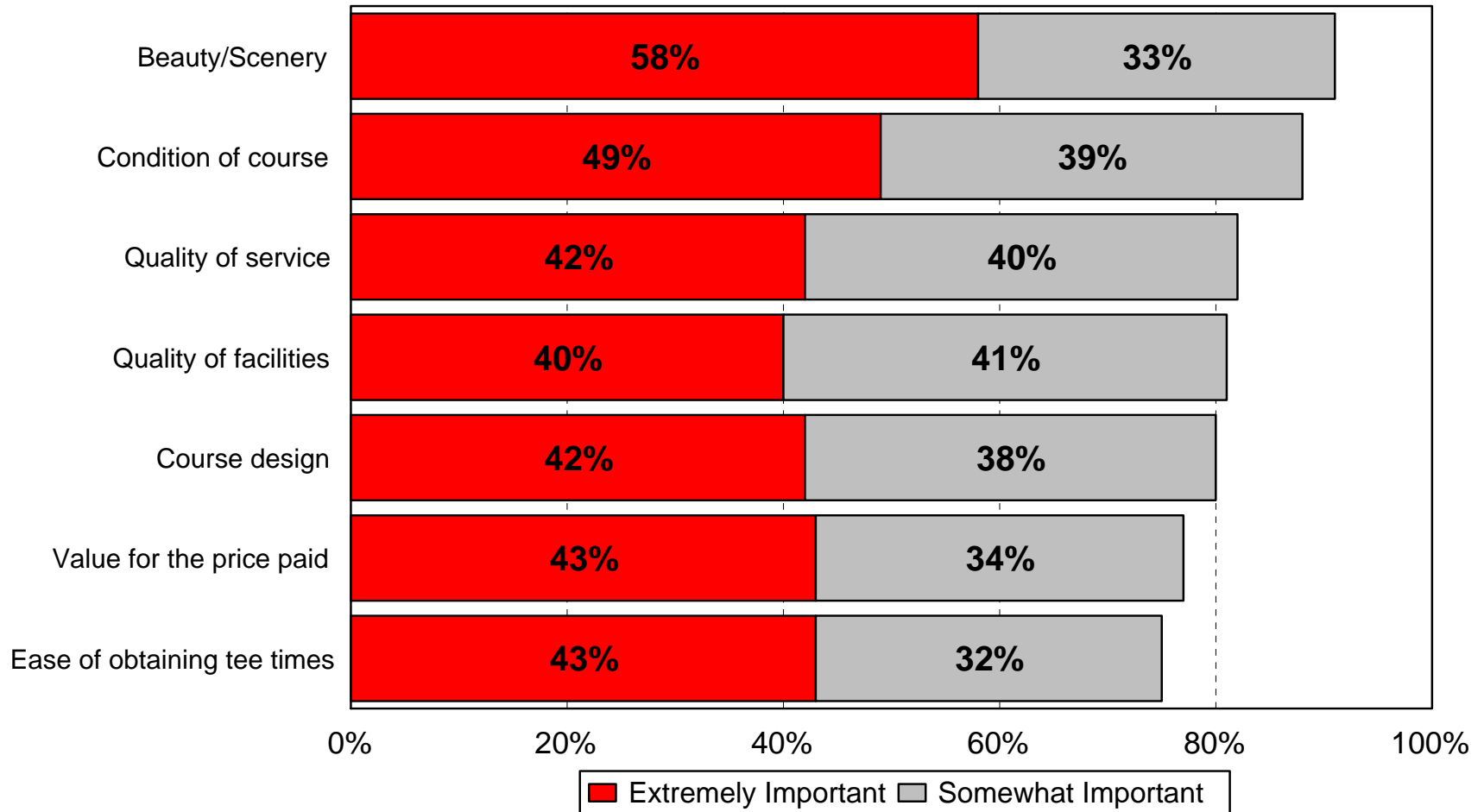
- Not a golfer at the time
- Not enough time
- Went to Hawaii for other reasons
- Too expensive

Top Five Golf Courses

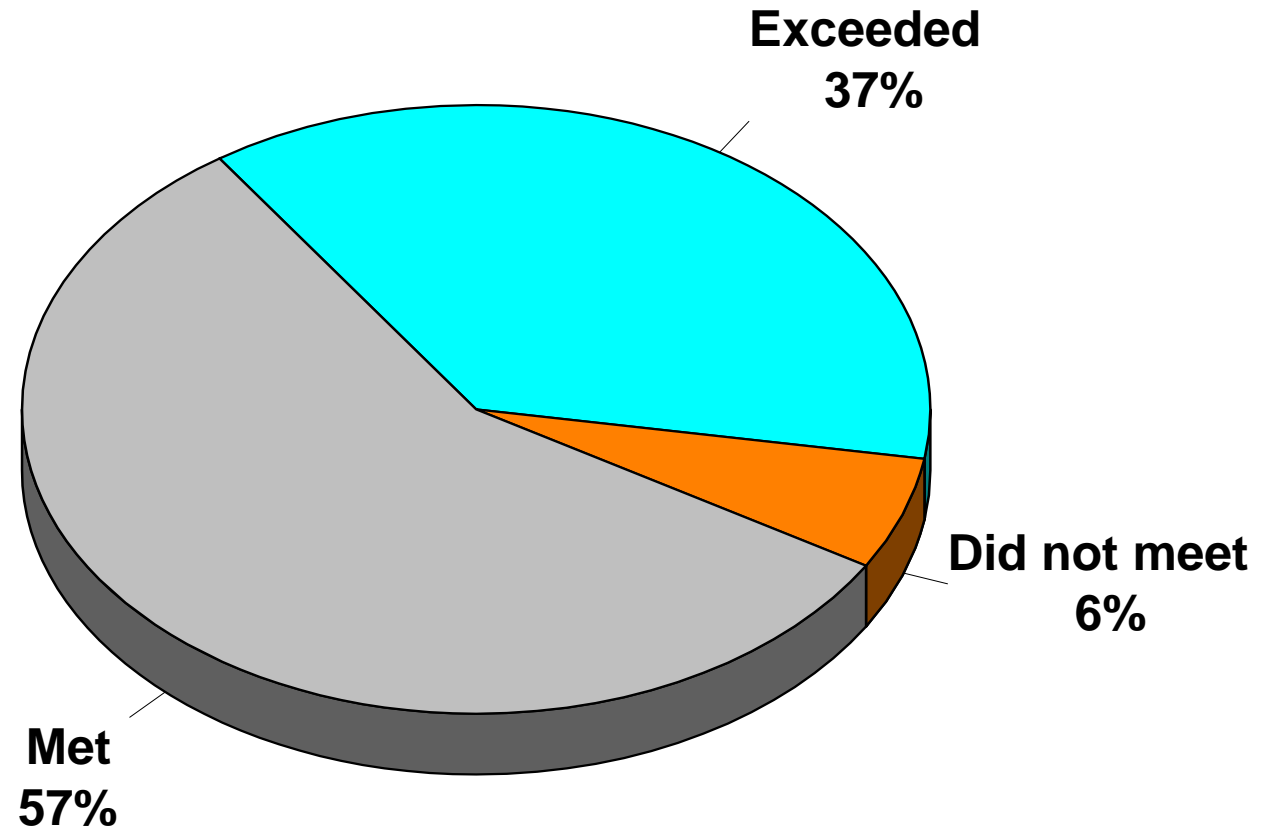


Mainland Sample only.

How do you select Hawaii golf course?



Did course meet, exceed or not meet your expectations?



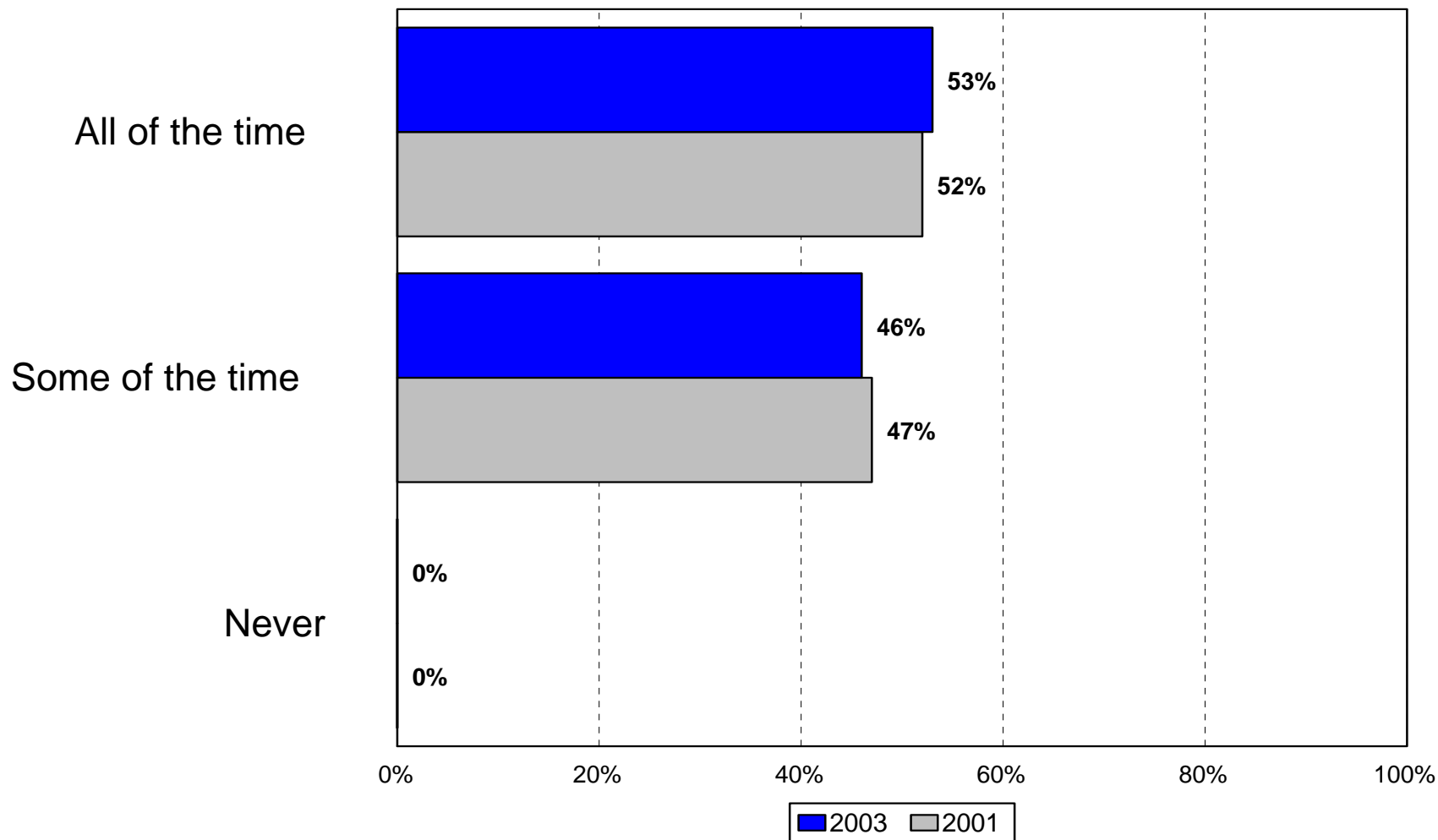
Golf Expenditures In Hawaii

Golf Expenses	AVERAGE
Rounds of Golf	\$553.05
Golf Merchandise	\$157.07
Food and Beverage During Golf	\$114.25

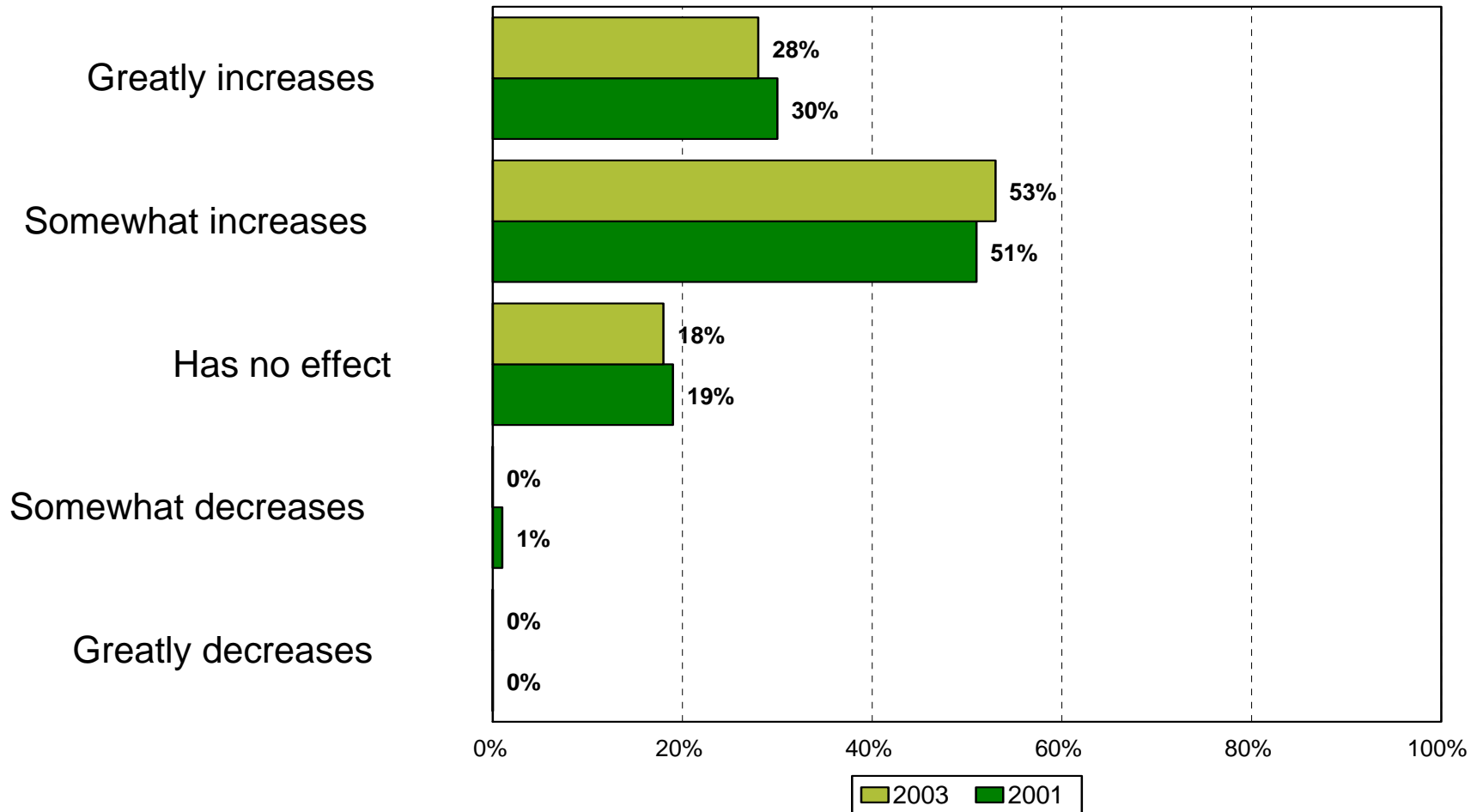
Additional Activities During Visit To Hawaii

ACTIVITIES	%
Snorkeling / Scuba	46%
Tour / Sightseeing	29%
Beach	25%
Shopping	19%
Volcanoes National Park	17%
Swimming	16%
Dining Out	14%
Hiking	9%
Luau	8%
Helicopter Tour	7%

Frequency of Watching Televised Golfing Events



Degree that watching golf event influences interest in visiting location...



Mahalo!



Prepared and presented by:
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